Acumatica 2021 R2 - What's New

Chris Isbell Martin and Associates, Cincinnati, Ohio



Release Info

• Over 90 New Features!

- 2 Releases per year
 - R1 around March/April
 - R2 around October



Finance

- Updates to Customer Refund processing *
- Matching of bank transactions *
- AP Document Recognition updates *
- Multiple base currencies
- Vendor search by email address on AP OCR *
- UI enhancements



Customer Refunds and Applications

- Old: manually create refund, enter details, apply to open payment, prepayment, cm
- New: find open payment, prepayment, cm record, select Refund as the action
- Also: can apply unreleased AR invoices to open payment records

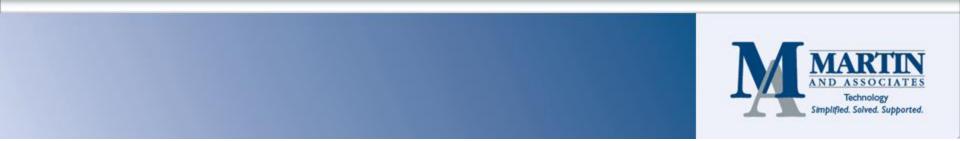


Enhancements to Bank Trx Matching

• Match to Multiple Payments

 Great if bank import has 1 deposit for many individual transactions in Acumatica

- Match to Receipts and Disbursements
 - Able to match to any available receipt or disbursement based on direction



AP Document Recognition Updates

- Faster time to recognize
- Enhanced Details mapping ability



Vendor Search by Email Address

Email Activity □ NOTES FILES (1) CUSTOMIZATION ← □ □ □ REPLY ALL REPLY ···	Vendors ALLFRUITS - All Fruits N	lall	0,	NOTES FILES CUSTOMIZ	ATION TOOLS -
From: "Ryan Carter" <allfruitsmall@gmail.com> To: CC:</allfruitsmall@gmail.com>	Vendor Status: Activ	Image: Control of the second secon	H ···· Balance: Prepayment Balance: Retained Balance:	1,139.10 0.00 0.00	
BCC: Subject: All Fruits Mall: Invoice AR009100 MESSAGE: DETAILS	GENERAL FINANCIAL ACCOUNT INFO ACCOUNT Name: All ACCOUNT ADDRESS	PAYMENT PURCHASE SETTINGS	ATTRIBUTES LO	Ryan Carter Accountant	
VISUAL • • • • Paragraph • B I <u>U</u> • <u>A</u> • · · · · · · · · · · · · · · · · · ·	Address Line 1: 334 Address Line 2:	W ON MAP D Deans Lane, Arlington Y York	Email: Business 1 + Cell + VENDOR PROPERTIES	rc.alifruitsmali@gmail.com	
please find the requested invoice attached. Best regards, Ryan Carter	Postal Code: 126	NEW YORK P 03 United States of America	PROJECT DEFAULTS	ULAnded Cost Vendor	P
Figure: The sender's email address, which is used to search for a vendor	Cell - Fax -	i14 853 4879 uitsmall@gmail.com [1] [2]	Inventory ID:		Q
	and the true				

Figure: An email address specified for a vendor account



Multiple Base Currencies

 Each company now can have its own Base Currency, different from other Companies within the same tenant

- Ex: USD company, CAD company, EUR company





CRM

- New Workflow for Sales Quotes *
- Enhanced relations between CRM entities *
- Enhanced support of UDFs
- Predefined business events and notification templates *
- Sendgrid email integration for emails
- UI enhancements



Order Management

- Customer refunds on Sales Orders and Invoices
- Drop Shipments for Projects
- Item substitution, cross-sell, up-sell
- Paperless picking no more pick sheets
- UI Enhancements



Manufacturing

- Preassigned Serial and Lot numbers
- Visual Production Schedule
- Vendor Shipment Enhancements
- Firm scheduling of Production Orders



Preassigned Serial and Lot Numbers

- Pre-assign numbers on a Production Order
 - When materials being issued
 - When produced item is being moved to stock
- Allows to prepare labels and other paperwork before order is complete



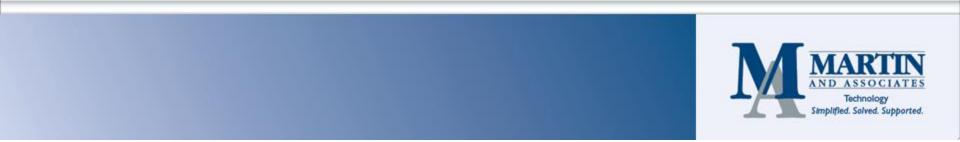
Visual Production Schedule

P	ODUCTION	ORDER	LTERS			REFEREN	CE FILTE	RS		DATE	RANGE			
	Varehouse:				ø	Inventory					n: 8/29/2021 -	To: 9/7/2021	-	
	Order Type:				,0	SO Order					LAY SETTINGS			
ł	Production N	br:			ρ	SO Order	r Nbr.:			Col	ar Coding:	Production Order Stat	tus -	
ļ	Production O	rder Statue	ĸ		*	Custome	r:			0				
1	chedule sta	tus:	Both		×									
1	Product Work	group:			,Q									
1	Product Many	agar			,p									
			Include on	Hold										
R	OUCTION (RDERS										+ 1	LATE ORDER	S Days
	Selected	Turns	Production N	Investory I	Dispatel	Constraint					2021 August 29			
	Selected	Type	Phoducade N	inventory i	Unparci	Constraint		29 Aug	30 Aug	31 Aug	54 E		03 Sep	04 Sep
								corrug	30 Aug	STRUG	01 Sep	02 Sep	an seb	14 945
		RO	AM002215	AMREURIO	5	8/12/2020 12		corrag	30 Mag	31700	01 Sep	02 Sep	us sep	ve orp
		R0 R0	AM000005		5	8/12/2020 12 8/12/2020 12		cong	30 Aug	1 Nug	UT SHP	02 Sep	03 Sep	U4 ORP
		RO	AM000010	MGPCB	5	8/12/2020 12		conej	30 Aug			02 Sep	u sep	v+ otp
		R0 R0	AM000010 AM000012	MGPCB MGRESVIN	5	8/12/2020 12 8/11/2020 12		conig	30 Aug		0020 Plan	02 Sep	u) sap	14 019
		RO	AM000010	MGPCB	5	8/12/2020 12		conig	30 Aug			02 Sep	u) oqp	14 Oth
vo		RO RO RO	AM000010 AM000012 AM000013	MGPCB MGRESVIN	5	8/12/2020 12 8/11/2020 12		conig	30 Aug			02 560	0.1 Odb	ue onp
-		RO RO RO	AM0000110 AM0000112 AM0000113 INES	MGPCB MGRESVIN MGBASE	5	8/12/2020 12 8/11/2020 12		ca nug	30 Aug				0.1 odb	un onp
		RO RO RO	AM000010 AM000012 AM000013	MGPCB MGRESVIN	5	8/12/2020 12 8/11/2020 12		29 Aug	30 Aug		0020 Plan		0.1 Sep	04 Sep
-		RO RO RO	AM0000110 AM0000112 AM0000113 INES	MGPCB MGRESVIN MGBASE	5	8/12/2020 12 8/11/2020 12					0020 Plan 2021 August 29			



Vendor Shipping Enhancements

- Create a new Purchase Order from a Production Order with expenses for outside processing services
- Create a new Vendor Shipment from a Production Order with outside processing operations





- Quick creation of Service Document from Opp or Project
- Tracking profitability of Items in service orders
- New Service contract billing types
- Mobile app enhancements



Other Areas

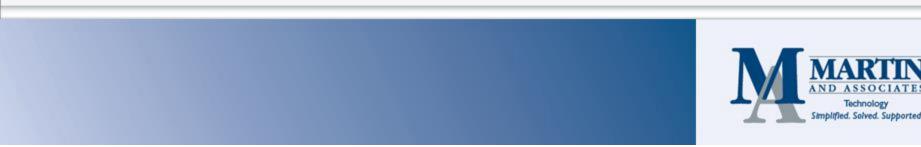


- Workflow assign categories to Actions
- Workflow save changes before Action performed
- UI redesigned form toolbar
- DAC Schema Browser
- CRM Task Subscriber on Business Events



Related Information

- <u>https://www.acumatica.com/acumatica-2021-</u> <u>r2-virtual-launch-event/</u>
- <u>https://acumatica-</u> <u>builds.s3.amazonaws.com/builds/21.2/Releas</u> <u>eNotes/AcumaticaERP_2021R2_ReleaseNotes.</u> <u>pdf</u>



Questions?

Please reach out to your account manager or me!

